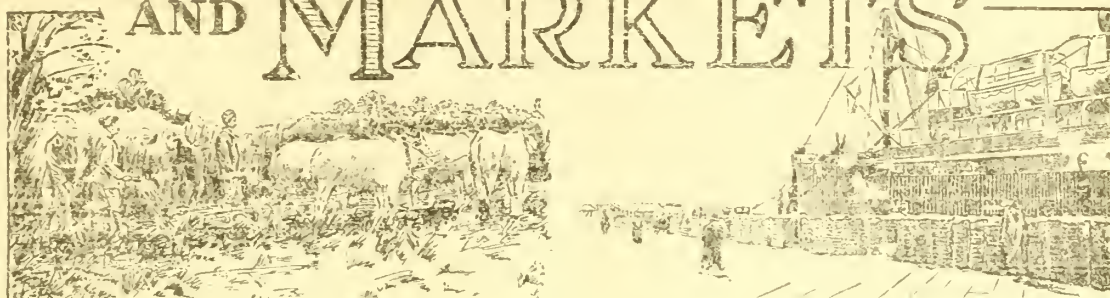


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# FOREIGN CROPS AND MARKETS



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## FEATURE ARTICLE

BREAD GRAIN CONSUMPTION AND TRADE IN SWITZERLAND

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## L A T E C A B L E S

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Winter acreage sown for 1935 crops estimated as follows, with 1934 comparisons in parentheses: Czechoslovakia wheat 2,212,000 acres (2,099,000), rye 2,428,000 (2,415,000); Finland wheat 55,000 acres (50,000), rye 628,000 (606,000). (International Institute of Agriculture, Rome, January 11, 1935.)

French Government issued authorization January 6 to export milling wheat to extent of 1,000,000 quintals (3,674,000 bushels). An export bounty of 70 francs per quintal (\$1.26 per bushel) is to be paid to exporters of this wheat, in order to enable them to meet world wheat prices. One fourth of this amount (918,000 bushels) has already been sold. (Assistant Agricultural Attache L. D. Mallory, Paris, January 8, 1935.)

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## C R O P   A N D   M A R K E T   P R O S P E C T S

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## BREAD GRAINS

Current changes in wheat and rye estimates

No material changes in the 1934 wheat estimates were received during the past week, the total for 47 countries remaining at 3,335,989,000 bushels. A revision in the 1933 Japanese crop, however, increased that year's total outturn in these countries to 3,654,474,000 bushels. The estimated rye crop of 1934, totaling 906,091,000 bushels, was also unchanged during the week, but the 1933 harvest was increased to 1,050,761,000 bushels by an upward revision for Turkey.

Southern Hemisphere crop notes

Reports from the Southern Hemisphere indicate favorable weather as a whole for Argentina and Australia. Grades show an improvement in Argentina as harvesting progresses, according to trade reports. The Australian crop is maintained by the trade at about 125,000,000 bushels, with harvesting operations almost completed, but yields continue irregular.

While heavy rains during the fall months did considerable damage in some regions of the Argentine wheat zone, they were beneficial in others, it was pointed out in a recent report from the United States Vice Consul at Buenos Aires. Crop deterioration was caused by locusts, rust, blight, and mildew, but the damage from locusts was considered less than last year, and injury from the other causes cited was local rather than general. Furthermore, it is said that, in former years, when rains and winds have beaten down the grain so that harvesting machinery could not be used, manual labor has been able to save much of the fallen grain.

The Shanghai wheat market

Stocks of wheat in Shanghai were quite low during the week ended January 5, but two cargoes of old-crop Australian wheat were booked early in the following week at 75 cents per bushel, according to radio messages from the Shanghai office of the Foreign Agricultural Service. Chinese millers were interested in buying wheat for delivery during February-April. Bookings for January and February included 2,500,000 bushels from Australia and 1,100,000 bushels from Argentina as compared with a total of about 5,000,000 bushels booked for the same delivery in 1934. About 2,000,000 bushels are expected to arrive in January. There was a sharp decline in the flour market during the week, which was attributed to the failure of the Chinese government to increase the import duty on wheat. Mills in Shanghai continued to run at 70-percent capacity, with flour stocks estimated at 1,000,000 bags. While the demand for flour of good quality was



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only fair, some increase in the demand for low-grade flour has been noted this winter as a result of shipments to drought-stricken areas.

Wheat prices, c.i.f. Shanghai duty included, were quoted as follows: Australian old-crop 75 cents per bushel, new-crop 78 cents; Argentine 79 cents; French 80 cents. Domestic wheat was not quoted. Domestic flour for January delivery was 87 cents per bag of 49 pounds, February 88 cents. Australian flour, c.i.f. Hongkong, was \$2.83 per barrel of 196 pounds.

Imports of flour into Dairen in November were reported by the United States Consul at that port as follows: Japan 1,132,000 bags, Australia 696,000, Shanghai 465,000, United States 10,000, Chosen 4,000, total 2,307,000 bags. Fairly active buying prevailed on the Dairen flour market the first half of December in spite of heavy arrivals prior to November 22, the date on which the new import duty on flour became effective. Imports of flour into Newchwang during October were reported as follows: Shanghai 417,000 bags, Japan 384,000 bags.

Hungarian farm relief

Government aid rendered Hungarian farmers of wheat, rye, and their mixtures, through the arrangement known as the grain-ticket or "boletta" system was suspended on June 30, 1934, after almost four years of operation. To replace this system, which had the effect of paying a bounty to the producer while levying a processing tax on the miller and feed dealer, the government has established minimum wheat prices at which wheat is to be accepted on behalf of the government by the Futura, or central marketing body of the Union of Hungarian Cooperatives, when market prices fall below the specified level.

This change in the method of governmental aid to farmers was made possible through the so-called "Rome Agreement," according to a special report from the Belgrade office of the Foreign Agricultural Service. Representatives of Hungary, Austria, and Italy, meeting at Rome in May 1934, arranged for the purchase of Hungarian wheat by Austria and Italy, in return for which the Hungarian government decreased import duties on certain Austrian and Italian goods. The Austrian government obligated itself to buy about 8,000,000 bushels of good Hungarian wheat and flour, in terms of wheat, at 16 pengö per quintal (\$1.29 per bushel at current exchange rates), f.o.b. the Austrian frontier. The Italian government agreed to purchase 3,700,000 bushels at 17 pengö per quintal (\$1.37 per bushel), f.o.b. the Italian frontier, and secured an option for a similar quantity. Should this option not be exercised, the Hungarian government may sell this amount of wheat to other countries with the understanding that, if the price falls below 17 pengö per quintal (\$1.37 per bushel), Italy will make up the difference.

## CROP AND MARKET PROSPECTS, CONT'D

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In this way, the need for large sums to make stabilization purchases was avoided by Hungary, since backed by these fixed prices it was possible to conclude arrangements with the Futura, the Grain Trade Company, and the Hungarian Cereal Exporters Association, whereby these organizations agreed to buy wheat weighing 80 kilograms per hectoliter (about 62 pounds per bushel) with a maximum of 2 percent foreign matter at a minimum price range of 13.35 - 15.30 pengö per quintal (\$1.08 - \$1.24 per bushel), f.o.b. loading station, according to the distance from the Austrian or Italian border or from navigable rivers. Should lower market prices develop, grain for export to Austria, Italy or other countries, would still have to be accepted on the terms of the Rome agreement. As a result of this season's moderate crop, however, and active demands from Switzerland and Germany, market prices had remained up to the date of the Belgrade report above the fixed minimum level. About 4,400,000 bushels of wheat had been sold to Austria by October 31, 1934, of which some 2,600,000 bushels had been delivered. Deliveries to Italy did not begin until late November.

The financial statement of the operation of the grain-ticket system, as officially published by the Hungarian Statistical News Service, is given below covering the period from July 15, 1930, through June 1934. This, as well as the corresponding estimates made by the Belgrade office of the Foreign Agricultural Service, shows a small loss which was more than offset, however, by government subsidies, and a small amount was left over to be expended in relieving the drought-stricken farmers of the 1934 season.

	RECEIPTS	Official	Belgrade office
		a/ Dollars	a/ Dollars
1. Sales of grain tickets		77,148,500	76,020,945
2. Flour tax		17,803,500	17,655,138
Total receipts		94,952,000	93,676,083
	EXPENDITURES		
3. Grain ticket payments		50,146,525	50,087,180
4. Grain ticket and flour tax refunds to exporters		40,473,290	40,087,548
5. Land tax paid instead of small farmers		7,714,850	7,299,435
6. Cost of handling		3,560,700	3,531,028
7. Poll tax facilities		2,670,525	979,192
8. Freight rate facilities		741,813	741,812
9. Interest facilities		890,175	890,175
Total expenditures		106,197,878	103,616,370
Less: Total receipts		94,952,000	93,676,082
Total loss		11,245,878	9,940,288

a/ Converted from pengö at current exchange rates.

## CROP AND MARKET PROSPECTS, CONT'D

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The total income derived amounted to \$109,788,250, but of this \$14,836,250 represented government subsidies; the actual fund totaled \$94,952,000. Of this, \$77,148,500 were received from sales of grain tickets and \$17,803,500 from the flour tax, which included amounts paid by mills on bread grains received in kind as compensation for commission grinding. This flour tax was not abolished with the suspension of the grain tickets, and proceeds from it are to be used for various kinds of farm relief work.

Expenditures during the existence of the grain-ticket system amounted to \$106,197,878. About 60 percent of this, set forth in items 3, 5, 7, 8, and 9 of the statement, was actually used to benefit the farmer. Refunds to exporters for grain tickets and flour tax, which enabled them to meet world competition, and handling charges constituted the remainder.

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## FEED GRAINS

Summary of recent feed grain information

It has been estimated that American purchases of old crop corn from Argentina up to the beginning of January amounted to more than 4,900,000 bushels and new crop corn to 6,900,000 bushels. Purchases of new crop oats amounted to upwards of 7,000,000 bushels. The condition of the barley crop in Egypt as of January 1 is reported as about average.

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## TOBACCO

Larger Chinese tobacco crop seen for 1935

Indications are that China may have a 1935 crop of flue-cured tobacco reaching about 180,000,000 pounds, according to radio advices from Agricultural Commissioner Dawson at Shanghai. The 1934 crop was placed at about 140,000,000 pounds. In view of the prospective increased 1935 production, important members of the leaf tobacco trade are scanning the possible export outlets for part of the crop. If such conditions are realized, prices will be lower and American leaf will meet greater competition in the Chinese market. Chinese press reports indicate that a rise in the import duty on tobacco is imminent.

Chinese tobacco interests anticipate a 1935 Shantung crop of around 100,000,000 pounds, provided average weather conditions prevail. The 1934 crop of about 65,000,000 represents a reduction of around 25 percent below earlier expectations as a result of bad weather. The crop, however, is of good color and includes a large proportion of better grades.



## CROP AND MARKET PROSPECTS, CONT'D

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The 1934 season in Shantung is now closed. Prices paid for the tobacco crop average considerably higher than in 1933 and farmers are already asking for seed for the 1935 crop. Last year considerable American seed was given out by a large foreign company in Shantung. The same company also has distributed seed in Anhwei and probably more will be given out for the 1935 crop. In Anhwei much common seed was also used so that the quality of the crop is not high.

The 1934 crop in Anhwei is placed between 20,000,000 and 30,000,000 pounds. There was considerable acreage expansion and more is anticipated for the 1935 crop. In Honan the tobacco crop is fully up to and may exceed earlier estimates of 50,000,000 pounds. The crop is of good color, but of only medium body. A large proportion has moved into trade channels.

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FRUITS, VEGETABLES, AND NUTSSlow export movement raises American apple storage figures

The slow export movement this season has been a factor contributing to the relatively large supplies of apples now in storage in the United States, according to the Foreign Service of the Bureau of Agricultural Economics. On December 1, 1934, there were about 31,000,000 bushels of apples in storage in the United States against 25,100,000 bushels on the corresponding date of 1933. The average storage figure for that date in the five-year period, 1929 to 1933, was 30,000,000 bushels. Of the current storage figure 18,000,000 bushels were in the form of boxes, 10,500,000 in baskets, and 828,000 in barrels. Both boxes and baskets were somewhat more plentiful than at this time last year. Exports should move somewhat faster now that the large European apple crops are pretty generally cleared. Apples in storage in Canada on December 1, 1934, were placed at 5,687,000 bushels against 7,250,000 bushels a year earlier.

German apple import trade continues restricted

The efforts of German fruit importers to secure American apples on the basis of barter payments have met with only slight success, according to Vice Consul Alan M. Steyno. Of the relatively few apples offered at recent Hamburg auctions, many have been in storage for nearly two months, with prices being heavily discounted on account of poor condition. A few lots have been received from British and Scandinavian markets, but the supply of imported apples has been considerably below market requirements. The limited supplies of fruit in good condition have realized good prices. About 28,000 boxes of apples from southern Russia were sold at Hamburg during November. The quality on the whole was good and the packing was similar to the American. Fair prices were obtained.

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BREAD GRAIN CONSUMPTION AND TRADE IN SWITZERLAND a/

Switzerland has a population of approximately 4,000,000 people and an area of 15,976 square miles, or slightly larger than the combined areas of the states of Maryland and Delaware.

Wheat is the principal bread grain of this country. The role that rye plays in bread making is only of minor importance. Its consumption for bread purposes probably does not represent more than 7 or 8 percent of the total of bread grains used. Pure rye breads are little used except by peasants in certain mountain districts where the only cereal grain that can be produced is rye. In other sections the use of rye in bread making is generally in combination with wheat, in which combination the percentage of rye is very small.

Production and consumption

In recent years wheat production in Switzerland has averaged slightly more than 4,000,000 bushels annually, which represents a substantial increase over prewar production. See following table.

WHEAT: Acreage, production, yield per acre, trade and apparent consumption, average 1909-1913, 1924-1928, 1929-1933, annual 1929-1934

Year	Acreage	Production	Yield per acre	Imports <u>a/</u>	Exports <u>a/</u>	Apparent consumption <u>b/</u>	
						Total	Per capita
	1,000 acres	1,000 bushels	Bush-els	1,000 bushels	1,000 bushels	1,000 bushels	Bush-els
Average:							
1909-1913	105	3,314	31.6	16,937	14	20,237	5.4
1924-1928	121	3,901	32.2	15,949	<u>c/</u>	19,850	5.0
1929-1933	135	4,131	30.6	18,668	14	22,785	5.6
Annual:							
1929.....	129	4,207	32.6	16,915	1		
1930.....	134	3,605	26.9	18,593	4		
1931.....	134	4,045	30.2	21,129	27		
1932.....	137	4,001	29.2	19,313	28		
1933.....	140	4,799	34.3	17,588	10		
1934.....		5,071					

Compiled in Foreign Agricultural Service Division from official sources.

a/ Years beginning July 1, except 1909-1913, which began August 1; no flour reported. b/ Stocks at the beginning and end of periods disregarded. c/ Less than 500 bushels.

a/ By J. H. Shollenberger, Grain Specialist, Foreign Agricultural Service. Based on studies made in Europe.

## BREAD GRAIN CONSUMPTION AND TRADE IN SWITZERLAND, CONT'D

Rye production in Switzerland in recent years has averaged slightly less than 1,500,000 bushels annually, a material decrease from the prewar production. See following table.

RYE: Acreage, production, yield per acre, trade, and apparent consumption, average 1909-1913, 1924-1928, 1929-1933, annual 1929-1934

Year	Acreage	Production	Yield per acre	Imports	Exports	Apparent consumption <sup>b/</sup>	
						Total	Per capita
	1,000 acres	1,000 bushels	Bush-els	1,000 bushels	1,000 bushels	1,000 bushels	Bush-els
Average:							
1909-1913	60	1,783	29.7	728	1	2,511	.7
1924-1928	51	1,647	32.3	39	<u>c/</u>	1,686	.4
1929-1933	47	1,491	31.7	324	<u>c/</u>	1,815	.4
Annual:							
1929.....	47	1,571	33.4	296	<u>c/</u>		
1930.....	50	1,457	29.1	296	<u>c/</u>		
1931.....	46	1,401	30.5	177	1		
1932.....	46	1,480	32.2	615	<u>c/</u>		
1933.....	46	1,545	33.6	237	<u>c/</u>		
1934.....	35	1,242	35.5				

Compiled in Foreign Agricultural Service Division from official sources.

a/ Years beginning July 1, except 1909-1913, which begin August 1. b/ Stocks at beginning and end of periods disregarded. c/ Less than 500 bushels.

The apparent annual consumption of wheat in recent years has averaged about 23,000,000 bushels. Of the quantity of wheat consumed, domestic production supplies only about one fifth and imports from foreign countries the other four fifths. The quantity of rye consumed is also in excess of domestic production, but only to the extent of a few hundred thousand bushels. Compared with consumption in the pre-war period 1909-1913, wheat consumption during the 1929-1933 period was higher whereas rye consumption was lower. This holds true for per capita consumption as well as for total consumption.

Imports and exports

Practically all importations of wheat and rye into Switzerland are in the form of grain. Only an insignificant quantity of these cereals is imported as flour. Annual wheat imports during the period 1929-1933 averaged 18,668,000 bushels, whereas rye imports averaged only 324,000 bushels. These figures represent, in the case of wheat an increase of 10 percent over the



## BREAD GRAIN CONSUMPTION AND TRADE IN SWITZERLAND, CONT'D

average for the 1909-1913 prewar period and in the case of rye a decrease of 55 percent.

According to import statistics published by the Swiss government (see table below), Canada, the United States, and Argentina, in the order named, have in recent years been the principal sources of Swiss imports of wheat. Since the depression, however, imports from the United States have shrunk to almost nothing. Other countries from which Switzerland has imported considerable quantities of wheat in years past are Australia, Russia, Hungary, Rumania, and Germany. In prewar times Russia was the chief source of supply.

Exports of wheat and rye from Switzerland seldom in any year have amounted to more than a few thousand bushels.

WHEAT: Imports into Switzerland according to countries of origin, for the calendar years 1913 and 1925 to 1932

Country of origin	1913	1925	1926	1927	1928
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
United States....	5,542	5,181	3,092	5,258	4,303
Canada.....	2,952	7,609	10,681	9,065	10,484
Argentina.....	1,211	1,156	1,262	1,025	1,503
Australia.....	36	420	40	729	123
Russia.....	6,835	436	475	493	147
Hungary.....	a/ 1	116	293	31	186
Rumania.....	1,845	0	96	17	0
Germany .....	935	47	85	3	77
Other countries..	89	40	85	8	11
Total.....	19,446	15,005	16,109	16,629	16,834
	1929	1930	1931	1932	1933
United States....	2,765	4,237	4,324	1,752	670
Canada.....	9,075	9,058	8,679	10,087	8,830
Argentina.....	3,579	1,748	1,882	4,348	5,252
Australia.....	62	16	68	46	26
Russia.....	0	909	2,532	403	480
Hungary.....	1,566	523	1,047	215	1,862
Rumania.....	0	148	1,734	878	38
Germany.....	83	44	106	1,162	752
Other countries..	19	948	132	267	821
Total.....	17,149	17,631	20,504	19,158	18,731

## BREAD GRAIN CONSUMPTION AND TRADE IN SWITZERLAND, CONT'D

Domestic wheats

In considering the wheats of Switzerland, some account should be taken of the production of mischel (mixed wheat and rye) and spelt. Much of the production of mischel is the result of spring seeding of rye in fall-sown wheat fields in which the wheat has been partially winter killed. According to Swiss marketing practices mischel is any mixture of wheat and rye in which the proportion of the latter is more than 5 percent but less than 50 percent. If less than 5 percent of rye is present the mixture is considered as wheat and if rye is present to the extent of 50 percent or more, the mixture is considered as rye.

Spelt is said to yield better than wheat in wet side-hill fields where the soil is heavy, but in the higher altitudes it is not so productive as rye. It is used as a bread grain the same as wheat. The bread baking properties of spelt are said to be equivalent to those of the common wheats of domestic production. In a few of the larger mills it is used in the production of pastry flour, for which purpose it is said to be especially well suited. Before spelt is milled into flour it is given a special decortication treatment for the removal of the chaff from the kernel. This decortication treatment is sometimes applied at the mill but is more often applied at the point of origin or some intermediate point as a part of the procedure in marketing. It is said that 145 kilograms of spelt are required to yield 100 kilograms of decorticated grain.

According to estimates furnished to the writer by a member of the Swiss government agency responsible for the handling and marketing of the domestic grain crop, wheat makes up approximately 61 percent, rye 13 percent, and spelt and mischel each 2 percent of the total of these grains produced in Switzerland.

In regard to the common wheat produced, approximately one fourth is spring sown and three fourths fall sown. Practically all of the wheat produced is of red color. The spring wheat is of semi-hard texture and is very similar in appearance to United States Hard Red Spring wheats. The winter wheats are similar in physical appearance to the harder types of Michigan, Ohio, and Pennsylvania Soft Red Winter wheats. It is probable that some Durum wheat is produced in the mountainous sections bordering Italy, but certainly not to any considerable extent.

The government maintains two agricultural experiment stations for the selection and improvement of cereal grains. One of these is located at Lausanne in the western part of the country and the other at Oerlikon in the eastern part. It is the policy of these experiment stations to introduce only varieties of good baking quality. It is also their policy to discourage the production of varieties of poor quality even though they are superior yielders to other known varieties. Because of this policy



## BREAD GRAIN CONSUMPTION AND TRADE IN SWITZERLAND, CONT'D

square head varieties, which are inherently of low quality, have been purposely kept out of Switzerland.

At the present time the procedure generally followed in the introduction of new varieties is to distribute seed to peasant-farmer organizations. This seed is given to one of the peasant members for sowing. The crop produced from this seed the government buys at 40 Swiss francs per 100 kilos (\$3.54 per bushel) and then sells to other farmers at a price of 14 francs (\$1.24 per bushel).

The most important varieties of wheat in Switzerland are as follows:

In French Switzerland: Mont Calme 22, a winter variety, and Huron, a spring variety.

In German Switzerland: Plantahof No. 3, Strickhof, and Rothenbrunnen No. 10, winter varieties, and Huron and Wagenburg, spring varieties.

Government regulations affecting the grain  
and milling industries

In 1915 a state grain monopoly was established in Switzerland for the purchase and sale of grains, foreign as well as domestic. In 1929 this monopoly was abolished, and a new plan of control was established which in some respects was also monopolistic in character. It provided for the purchase of wheat and rye at guaranteed prices based on quality, the maintenance of grain reserves, payment of grading subsidies, reduction of transportation charges, and the support of the national milling industry. This entire plan is supported by a small tax, called a statistical tax, on all goods imported into Switzerland. Under this plan the right to import flour for bread making purposes is reserved to the state. The right to import grain, however, is not reserved to the state, but a small duty is charged on these importations. The millers are compelled to take domestic grain purchased by the state grain office but at a much lower price than that paid to the farmer. The price to the farmer is based largely on production costs while the price charged the miller approximates world market prices. Losses resulting from these operations are paid for out of the statistical tax collections previously mentioned.

Under authority of a law dated December 23, 1931, the Swiss Federal Council inaugurated a quota and licensing system for the importation of grains. Based on reciprocal trade agreements with other countries, grain importations are restricted to certain countries and definite limits are placed on the quantity that may be imported from each. The sum total of the quantities or quotas allotted to the various countries is fixed in accordance with the estimated domestic requirements, less domestic produc-

## BREAD GRAIN CONSUMPTION AND TRADE IN SWITZERLAND, CONT'D

tion. In addition to these import limitations which apply to the country as a whole, similar import quotas also are established for each mill based on its production capacity and on the volume of business done in past years.

Millers are required to mill to a flour extraction of at least 70 percent. In order to give added assurance that this regulation will be complied with, the government on January 1, 1934, placed a tax of 75 centimes per 100 kilos (6.6 cents per bushel) on the production of mill offals. In addition to the extraction requirement the government also requires that the flour produced shall be of the two following grades:

Portion of extraction from

1st grade .....0 to 18 percent

2nd grade .....19 to 70 percent and  
upward

It might be well to mention here that the first grade flour (a patent flour) is used for pastries, cakes, and luxury breads, and that the second grade flour is used for the common breads and ordinary household purposes.

The Swiss government maintains ownership of 80,000 metric tons (about 3,000,000 bushels) of foreign wheat as a national reserve for use in times of war and other emergencies. One half of this wheat is kept in storage houses owned or operated by the government and the other half, 40,000 tons, is stored in the warehouses and silos of commercial mills. The millers receive no compensation for this service, but are permitted to use the government's wheat provided they substitute other foreign wheat for it, but the wheat substituted must actually be on hand. In this way the stocks owned by the government can be renewed from year to year to prevent deterioration from age.

Milling practices and wheat preferences

There are approximately 300 mills in Switzerland, only about 40 of which have a wheat grinding capacity of 10 metric tons (367 bushels) or more per 24 hours. Most of the mills are of small capacity and operate as custom mills. The largest mill, Moulin Cooperatif de Zurich, is of 80 metric tons (3,000 bushels) capacity. Zurich is the largest milling center in Switzerland.

Only two Swiss mills have chemical laboratories. Both of these are located at Zurich. Other mills when in need of chemical analysis service submit their samples for analysis to a commercial laboratory operated by a mill machinery manufacturing company; but, as a general rule, chemical analyses are not considered of much importance by Swiss millers.

## BREAD GRAIN CONSUMPTION AND TRADE IN SWITZERLAND, CONT'D

The grain cleaning and conditioning equipment used in Swiss mills, although including all the different types of machines and devices essential for good cleaning and conditioning, is not as complete nor so elaborate in character as in English mills. Only a few of the mills are equipped with washers. The system of milling employed is similar to that in Germany.

The grain storage accommodations at Swiss mills are generally relatively greater than those at mills in other European countries. This is due in part, probably, to the geographical location and mountainous character of the country which affect the accessibility of outside sources of supply. A Zurich mill of 50 metric tons daily grinding capacity visited by the writer had storage space, chiefly of the silo type, for approximately 4,000 tons of grain. This mill was required to keep in storage 1,000 tons of government grain. In addition to this quantity it usually keeps in storage from 2,000 to 3,000 tons for its own purposes. A mill of 22½ metric tons grinding capacity, visited at Geneva, had silo storage space for 1,500 metric tons of grain and warehouse space for 400 metric tons. This mill usually carries from 3 to 4 months' supply of grain in addition to 530 metric tons of government owned grain which it is required to store. The director of this mill was of the opinion that Swiss mills, on the average, carry from 2 to 3 months' supply of grain.

Wheats of strong baking quality are the kind chiefly wanted from foreign countries. Canadian spring, U. S. Hard Winter, and the better types of Russian and Argentine wheats are the sorts best liked. Under conditions which permit the miller full freedom of choice in the wheats he uses, a milling mixture that is considered to be typical of Swiss milling practice is one consisting of 30 percent Canadian, 20 percent U. S. Hard Winter, 25 percent Argentine, and 25 percent domestic and other wheats. Another mixture reported as being suitable is one consisting of 50 percent No. 1 and 2 Northern Manitobas, 30 percent U. S. Hard Winter, and 20 percent Swiss wheat. Nos. 1 and 2 Northern Manitobas are the grades of Canadian wheat most generally used at the present time. Some wheat of the No. 1 Hard Manitoba grade is also used and occasionally some of the lower grades, but these latter are less useful now than formerly owing to the fact that the compulsory use, under existing import regulations, of other inferior wheats makes it desirable that the Canadian wheats used be only of the better grades.

As regards Argentine wheats, the premium qualities are mostly used. Bahia Blanca shipments of wheat of the Kanred variety are considered the best in quality.

In the production of bread flours, Canadian wheats are first in preference and U. S. Hard Winters second. Besides bread flour wheats, Switzerland uses approximately 60,000 metric tons (2,200,000 bushels) of durum wheat annually in the production of semolina for macaroni and similar alimentary pastes. Inasmuch as she produces practically no durum



## BREAD GRAIN CONSUMPTION AND TRADE IN SWITZERLAND, CONT'D

wheat, all the wheat of this type needed must be obtained from foreign countries. United States durum is suitable for this trade and much of it has been used in past years, but under the import regulations which have been in force in recent years, it is no longer possible to import any of this wheat into the country.

Some of the U. S. Durum wheat formerly used came through Canadian ports and some through United States ports. Inspections in connection with the shipment of U. S. Durum wheat through Canadian ports are known as "Seaboard" inspections and those in connection with shipments through United States ports as "Federal" inspections. Wheat which carries an inspection certificate of the latter kind commands a higher price than the so-called "Seaboard" inspected wheat.

The government requires a minimum flour extraction of 70 percent. The usual extraction, however, for the commercial mills at the present time is about 74 percent. Previously, when millers were free to import as much Canadian and United States wheats as they desired, it is said that flour extractions were about 75 percent.

Bakery practices

The baking of bread in Switzerland is done chiefly in small shops. Only in a few of the largest cities are there any bakeries of the so-called factory type.

The mechanical equipment used in the shop type of bakery usually consists only of a mixer of the slow speed bowl type and a hand operated divider for use in the production of rolls. The ovens used are generally electrically heated. Both the sponge and dough and the straight dough baking methods are used in the production of Swiss breads. A quick fermentation procedure is used. This is necessary, owing to a law prohibiting work in bakeries before 2:00 A.M. The leavening agent employed is, in most instances, sour dough; yeast is used only in the cities, and, in many of them, not very extensively.

Practically all breads are hearth baked. The materials used in the production of common breads include only flour, water, and salt. Some milk is used in luxury breads and rolls, and some sugar and fats. These ingredients, however, are too expensive for use in the common breads.

Bread prices are fixed by trade agreement among the members of bakers' guilds except that the government exercises some sort of supervision over the price fixing procedure.

As judged from 1934 characteristics of quality, the common breads of Switzerland have a thick, harsh, dark brown crust with a soft, spongy interior or coarse texture. The crum is of light grey color and of good

## BREAD GRAIN CONSUMPTION AND TRADE IN SWITZERLAND, CONT'D

flavor. The breads made by the sour dough fermentation method have a slightly sour taste. Compared with French breads, the common breads made in Switzerland are of slightly better flavor and have a coarser, harder crust but a softer and more moist crumb. Their grey color is due to the use of a long extraction wheat flour, which frequently contains some rye flour.

The luxury loaf-breads are of excellent quality and the rolls are of the finest quality found anywhere in Europe. These latter have a thin, fine, crisp crust with a creamy colored close-grained spongy interior. They have a very pleasing flavor. Formerly the breads of Switzerland were of better quality than at present. This was due to the use of better wheat in milling mixtures.

Dietary habits

Breakfast: (7:00 A. M.) This meal, for city people, consists of coffee (half milk) and bread with jam, and sometimes butter. Formerly sugar was not generally used in coffee, but in recent years, owing to its cheapness, most people have formed the habit of using it.

Dinner: (12 M. to 1 P.M.) Dinner is the principal meal of the day. It consists of bread, soup, potatoes, vegetables, stewed fruit or a pudding and usually, but not always, meat. City people eat only a small quantity of bread with this meal, but with country people much more is eaten. No coffee is served, but children are usually given milk to drink, while adults sometimes drink beer.

Supper: (6 to 7 P.M.) This meal is a light one consisting of coffee (half milk), bread, stewed fruit, or berries, and fried potatoes, eggs, or fish.

The working day for the laboring class of people at the present time is under governmental regulation and, for most forms of employment, is limited to 7½ hours beginning at 7:30 A. M. and ending at 6:00 P. M. with two hours off for dinner. Before the World War the work day was much longer, beginning at 6:30 A. M. and ending at 7:30 P. M. Under such conditions of employment the people found it necessary to eat a lunch in the middle of the forenoon and afternoon in addition to their other meals. With the shortening of the work day the lunch habit was discontinued and as a result food consumption, particularly bread, has materially decreased. Within the past few years milk drinking between meal times has come into vogue. This practice is tending to increase.

Despite the fact that Swiss cheeses are of world renowned quality, Swiss people do not generally eat much cheese.



## UNITED STATES AGRICULTURAL REEXPORTS ABOVE 1932-33

The United States always exports a small portion of the farm products received from foreign sources. However, exports of agricultural products imported from abroad, or the so-called reexports, are comparatively unimportant when compared with total imports. During the year ended June 30, 1934, reexports of farm products, exclusive of forest products, were valued at \$21,227,000, a considerable gain over 1932-33 but otherwise the smallest since 1913-14. The farm products reexported in largest volume are crude rubber, raw silk, sisal, unmanufactured work, hides and skins and cacao beans, much of which goes to Canada and Mexico. In addition to Canada and Mexico, European markets also absorb a large share of the cacao beans but most of the reexported coffee goes to Germany, the Netherlands, France, and Sweden.

UNITED STATES: Reexports of agricultural products as compared with total reexports, 1908-09 to 1933-34

Year ended June 30	Total	Agricultural			Percent of total
		Excluding forest	Forest	Including forest	Excluding forest
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent
1908-09.....	24,656	12,779	1,789	14,568	51.8
1909-10.....	34,901	22,162	2,110	24,272	63.5
1910-11.....	35,771	20,573	1,679	22,252	57.5
1911-12.....	34,003	17,171	1,500	18,521	50.5
1912-13.....	37,378	19,652	2,809	22,461	52.6
1913-14.....	34,895	20,286	1,961	22,247	58.1
1914-15.....	52,411	38,222	1,287	39,509	72.9
1915-16.....	61,305	45,017	1,435	46,452	73.4
1916-17.....	62,884	45,420	3,392	48,812	72.2
1917-18.....	81,059	44,210	1,409	45,619	54.5
1918-19.....	150,821	105,587	3,758	109,345	70.0
1919-20.....	159,680	128,191	5,380	133,571	80.3
1920-21.....	130,626	90,739	4,043	94,782	69.5
1921-22.....	71,247	43,589	2,315	45,904	61.2
1922-23.....	70,051	48,393	1,955	50,348	69.1
1923-24.....	87,683	62,719	1,563	64,282	71.5
1924-25.....	86,426	64,168	1,290	65,458	74.2
1925-26.....	100,234	75,162	1,450	76,612	75.0
1926-27.....	100,753	72,222	1,365	73,587	71.7
1927-28.....	103,738	73,391	1,528	74,919	70.7
1928-29.....	89,470	63,942	2,157	66,099	71.5
1929-30.....	75,732	50,670	1,382	52,052	66.8
1930-31.....	51,426	28,791	858	29,649	56.0
1931-32.....	39,891	22,692	409	23,101	56.9
1932-33.....	26,963	14,763	297	15,060	54.8
1933-34 prelim...	33,235	21,227	401	21,628	63.9

Foreign Agricultural Service Division. Compiled from Foreign Commerce and Navigation of the United States, 1908-09 to 1917-18, Monthly Summary of Foreign Commerce of the United States, June issues, 1919-1926, January and June issues, 1927-1934, and official records of the Bureau of Foreign and Domestic Commerce.

## Foreign Crops and Markets

## UNITED STATES REEXPORTS OF AGRICULTURAL PRODUCTS, 1932-33 and 1933-34

Article reexported	Unit	Year ended June 30			
		Quantity		Value	
		1932-33	1933-34	1932-33	1933-34
		1932-33	prelim.	1932-33	prelim.
		Thousands	Thousands	1,000	1,000
				dollars	dollars
<b>ANIMALS AND ANIMAL PRODUCTS:</b>					
<b>Animals, live:</b>					
Edible .....	No.	a/	a/	1	6
Inedible .....		b/	b/	6	6
Total animals, live .....				7	12
<b>Dairy products:</b>					
Butter .....	Lb.	1	118	a/	15
Cheese .....	Lb.	67	163	16	38
Milk, condensed & evaporated .....	Lb.	423	342	102	101
Total dairy products .....	Lb.	491	623	118	154
<b>Eggs and egg products:</b>					
Egg albumen .....	Lb.	15	48	6	22
Eggs, frozen, dried or canned .....	Lb.	104	642	19	120
Total eggs & egg products .....	Lb.	119	690	25	142
<b>Hides &amp; skins, raw (except furs):</b>					
<b>Cattle hides-</b>					
Dry (over 12 lbs.) .....	Lb.	475	630	44	73
Wet (over 25 lbs.) .....	Lb.	808	1,058	48	110
Goat and kid skins .....	Lb.	260	511	44	146
<b>Kip and calfskins-</b>					
Dry (not over 12 lbs.) .....	Lb.	119	148	16	41
Wet (not over 25 lbs.) .....	Lb.	59	44	4	4
<b>Sheep and lamb skins-</b>					
Dry .....	Lb.	30	382	11	48
Wet .....	Lb.	778	362	56	77
Other hides and skins .....	Lb.	169	242	111	119
Total hides and skins .....	Lb.	2,698	3,377	334	618
<b>Meats and meat products:</b>					
Beef and veal, fresh .....	Lb.	1	1	a/	a/
Prepared and preserved .....	Lb.	301	87	31	16
Other meats .....	Lb.	40	36	4	7
Total meats .....	Lb.	342	124	35	23
<b>Oils and fats, animal:</b>					
Animal fats and oils, edible .....	Lb.	3	0	a/	0
Animal oils, fats & greases, inedible .....	Lb.	7,787	15	426	a/
Total oils & fats, animal .....	Lb.	7,790	15	426	a/
Silk, raw .....	Lb.	2,490	2,752	3,954	4,639
Silk waste .....	Lb.	35	a/	4	a/

Continued

## UNITED STATES REEXPORTS OF AGRICULTURAL PRODUCTS, 1932-33 and 1933-34, cont'd.

Article reexported	Unit	Year ended June 30			
		Quantity		Value	
		1932-33	1933-34	1932-33	1933-34
		Thousands	Thousands	1,000 dollars	1,000 dollars
<b>ANIMALS AND ANIMAL PRODUCTS, CONTINUED:</b>					
<u>Wool, unmanufactured:</u>					
Carpet wool.....	Lb.	100	285	17	31
Clothing wool.....	Lb.	5	203	2	28
Combing wool.....	Lb.	2,080	3,635	416	692
Hair, Angora (mohair), Cashmere goat, alpaca, etc.....	Lb.	23	133	3	26
Total wool, unmanufactured....	Lb.	2,208	4,256	438	777
<u>Miscellaneous animal products:</u>					
Bristles.....	Lb.	175	568	165	476
Hair, unmanufactured.....	Lb.	116	280	23	46
Sausage casings.....	Lb.	166	37	50	27
Other animal products, edible..	b/	b/	b/	15	18
Other animal products, inedible..	b/	b/	b/	26	45
Total animals & animal products				5,620	6,977
<b>VEGETABLE PRODUCTS:</b>					
Cocoa beans.....	Lb.	9,091	9,541	441	548
Cocoa and chocolate.....	Lb.	260	438	11	20
Coffee.....	Lb.	8,630	14,574	937	1,636
Cotton, unmf'd. (478 Lbs).....	Bale	6	14	258	893
<u>Fruits:</u>					
Bananas.....	Bunch	409	291	690	503
Dates.....	Lb.	1,385	2,625	34	91
Figs.....	Lb.	169	97	12	6
Grapes.....	Lb.	195	162	17	17
Lemons.....	Box	5	3	18	7
Olives.....	Gal.	21	64	15	38
Pineapples.....	Box	15	9	28	14
Other fruits, fresh, prepared or preserved.....	Lb.	495	383	29	26
Total fruits & preparations				843	702
<u>Grains and grain products:</u>					
<u>Rice-</u>					
Cleaned.....	Lb.	1,880	5,623	54	192
Uncleaned.....	Lb.	50	244	1	9
Wheat.....	Bu.	452	21	243	18
Wheat flour.....	Bbl.	1	a/	2	1
Other grains & preparations....	b/	b/	b/	4	25
Total grains & preparations..				304	245

Continued



## UNITED STATES REEXPORTS OF AGRICULTURAL PRODUCTS, 1932-33 and 1933-34, cont'd.

UNITED STATES DEPARTMENT OF COMMERCE		Year ended June 30		1933-34	
Article reexported	Unit	Quantity		Value	
		1932-33 Thousands	1933-34 Thousands	1932-33 1,000 dollars	1933-34 Prelim. 1,000 dollars
VEGETABLE PRODUCTS, CONTINUED:					
<u>Nuts:</u>					
Almonds, sweet .....	Lb.	10	70	21	33
Brazil or cream .....	Lb.	242	302	1	33
Filberts .....	Lb.	7	255	6	a/
Peanuts .....	Lb.	222	a/	24	24
Walnuts .....	Lb.	19	227	25	43
Other nuts, edible .....	Lb.	132	358	79	149
Total nuts .....	Lb.	813	1,212	6	4
<u>Oilseeds and oilseed products:</u>					
Copra, oil cake, residue .....	Lb.	540	350	7	4
<u>Oils-</u>					
Essential or distilled-					
Lemon oil .....	Lb.	8	4	83	132
Other essential or distilled	Lb.	97	1	90	136
Total essential or distilled	Lb.	105	5	1	a/
Expressed-					
Cocoa butter .....	Lb.	4	2	85	135
Coconut oil .....	Lb.	2,640	3,938	9	6
Olive oil, edible .....	Lb.	65	43	159	62
Palm and palm kernel .....	Lb.	5,424	1,630	a/	a/
Peanut oil .....	Lb.	2	3	2	0
Soybean oil .....	Lb.	46	0	181	338
Tung oil .....	Lb.	3,329	5,184	84	140
Vegetable wax .....	Lb.	641	825	24	46
Other expressed oils & fats	Lb.	438	729	45	727
Total expressed oils & fats	Lb.	12,589	13,352	6	863
Total vegetable oils .....	Lb.	12,694	12,487	6	1
<u>Oilseeds-</u>					
Copra .....	Lb.	9,455	13,477	183	234
Other oilseeds .....	Lb.	714	72	26	3
Total oilseeds .....	Lb.	10,169	13,549	209	237
<u>Rubber and similar gums:</u>					
Balata .....	Lb.	203	130	33	36
Gumyule .....	Lb.	19	99	2	1
Gutta-percha, rubber substitutes and scrap .....	Lb.	32	12	3	3
Rubber, crude .....	Lb.	38,708	60,494	1,604	4,92
Total rubber & similar gums .....	Lb.	38,962	60,795	1,642	4,97
<u>Seeds, except oilseeds:</u>					
Field and garden seeds-					
Clover .....	Lb.	0	3	0	a/
Other seeds, including grass .....	Lb.	161	571	4	2
Vegetable and flower seeds .....	Lb.	75	87	11	1
Total seeds except oilseeds	Lb.	236	661	15	1

Continued

Continued

## UNITED STATES REEXPORTS OF AGRICULTURAL PRODUCTS, 1932-33 and 1933-34, cont'd

Article reexported	Unit	Year ended June 30			
		Quantity		Value	
		1932-33	1933-34	1932-33	1933-34
		Thousands	Thousands	1,000	1,000
			Prelim.	dollars	Prelim.
<b>VEGETABLE PRODUCTS, CONTINUED:</b>					
<b>Spices:</b>					
Cinnamon.....	Lb.	529	689	44	63
Cassia.....	Lb.	251	279	11	15
Cloves, unground.....	Lb.	182	219	18	24
Mustard, whole or ground.....	Lb.	45	6	2	a/
Nutmegs, unground.....	Lb.	92	105	10	13
Pepper, unground.....	Lb.	534	840	46	87
Vanilla beans.....	Lb.	54	53	52	58
Other spices.....	b/	b/	b/	53	54
Total spices.....				236	314
<b>Sugar:</b>					
Cane sugar (2,000 lbs.).....	Ton	9	8	340	265
Tea.....	Lb.	297	1,706	83	316
<b>Tobacco, unmanufactured:</b>					
Leaf for cigar wrapper.....	Lb.	493	135	592	200
Other leaf.....	Lb.	540	620	234	263
Total tobacco, unmanufactured.....	Lb.	1,033	805	826	463
<b>Vegetables and preparations:</b>					
<b>Dried and fresh-</b>					
Beans, dried.....	Lb.	3,951	4,282	74	94
Peas, dried and split.....	Lb.	2,234	3,143	93	139
Mushrooms and truffles.....	Lb.	153	2	51	1
Potatoes, white.....	Lb.	53	120	1	2
Other fresh.....	b/	b/	b/	7	23
Farinaceous substances.....	Lb.	546	992	14	29
Vegetables, canned or preserved.....	Lb.	30	26	16	2
Pickles, sauces & relishes.....	Lb.	134	159	9	12
Other vegetables & preparations.....	b/	b/	b/	30	41
Total vegetables & preparations.....				295	343
<b>Miscellaneous vegetable products:</b>					
Drugs, herbs, leaves & roots, crude.....	Lb.	724	1,258	128	267
<b>Fibers, vegetable-</b>					
Flax, unmanufactured (2240 lbs).....	Ton	a/	0	8	0
Hemp, unmanufactured ".....	Ton	a/	a/	14	23
Istle or Tampico ".....	Ton	1	1	44	46
Jute and jute butts ".....	Ton	a/	a/	16	14
Kapok.....	Ton	a/	a/	29	45
Manila or abaca.....	Ton	3	3	213	263
Sisal or henequen.....	Ton	25	14	1,384	1,143
Other unmanufactured fibers ".....	Ton	1	1	8	10
Total vegetable fibers ".....	Ton	30	19	1,716	1,544
Bulbs, roots, and corms.....	No.	20	30	1	2
Vegetable ivory or tagua nuts..	Lb.	3,700	6,028	66	127

Continued -



## UNITED STATES REEXPORTS OF AGRICULTURAL PRODUCTS, 1932-33 and 1933-34, cont'd

Article reexported	Unit	Year ended June 30			
		Quantity		Value	
		1932-33	1933-34 Prelim.	1932-33	1933-34 Prelim.
VEGETABLE PRODUCTS, CONTINUED:		Thousands	Thousands	1,000 dollars	1,000 dollars
Misc. veg. products, continued:					
Other veg. food prod. and bev.	b/			59	200
Other inedible veg. products..	b/			13	89
Total vegetable products....				9,143	14,250
FOREST PRODUCTS:					
Dyeing and tanning materials:					
Myrobalans, quebracho, sumac, etc. crude (2240 lb.) .....	Ton	1	1	27	30
Quebracho extract.....	Lb.	124	82	3	3
Other dyeing & tanning extracts	Lb.	252	299	14	17
Total dyeing & tanning materials				44	50
Gums, resins, and balsams:					
Camphor, natural and synthetic	Lb.	18	22	5	9
Chicle.....	Lb.	7	101	3	21
Varnish gums and resins-					
Shellac.....	Lb.	124	88	17	12
Other varnish gums & resins.	Lb.	503	434	37	47
Other gums, resins, etc.....	Lb.	454	688	56	108
Total gums, resins & balsams	Lb.	1,106	1,333	118	197
Wood:					
Boards, planks, & scathlings-					
Cabinet woods.....	M.ft a/		a/	14	24
Hardwood, except cabinet....	M.ft a/		a/	5	4
Softwood.....	M.ft	1	a/	39	4
Cabinet wood logs.....	M.ft a/		a/	43	72
Other logs and timber.....	M.ft a/		a/	a/	6
Other unmanufactured wood.....	b/		b/	15	6
Total wood.....				116	116
Miscellaneous forest products:					
Chemical wood pulp, sulphite.. (2240 lb.) ....	Ton a/		1	10	24
Other wood pulp.. "	Ton a/		a/	1	a/
Cork, wood, or bark, unmfed....	Lb.	4	9	1	1
Rattan, unmanufactured.....	Lb.	82	123	7	13
Total forest products, excl. rubber & similar gums.....				297	401
Total veg. products, incl. forest products.....				9,441	14,651
Total vegetable products, excl. forest products.....				9,143	14,250
Total agri. prod., incl. forest products.....				15,060	21,628
Total agri. prod., excl. forest products.....				14,763	21,227

Foreign Agricultural Service Division. Compiled from official records of the Bureau of Foreign and Domestic Commerce. a/ Less than 500. b/ Reported in value only.

COTTON, UNMANUFACTURED: Exports from the United States, by countries,  
November and August-November, 1933 and 1934

(Bales of 500 lbs. gross)

Country to which exported	August-November		November	
	1933	1934	1933	1934
	Bales	Bales	Bales	Bales
<b>LONG AND SHORT STAPLE:</b>				
Germany .....	375,550	171,832	179,359	22,689
United Kingdom .....	605,962	266,877	163,915	96,913
France .....	442,409	175,151	103,523	44,466
Italy .....	315,514	193,750	63,115	82,240
Spain .....	123,864	99,406	36,918	24,822
Poland and Danzig .....	99,378	76,516	30,028	22,184
Belgium .....	53,981	28,774	13,705	7,732
Netherlands .....	49,911	26,338	14,445	7,295
Sweden .....	30,285	40,353	7,393	15,997
Portugal .....	23,020	11,099	6,307	2,122
Soviet Russia (Europe) .....	21,774	0	0	0
Other Europe .....	37,015	43,429	12,588	14,821
Total Europe .....	2,483,663	1,133,575	631,332	341,281
Canada .....	92,583	85,471	36,339	35,985
Japan .....	842,987	723,131	237,535	206,765
China .....	112,544	44,703	54,913	12,138
British India .....	13,316	104	3,503	0
Other countries .....	14,063	6,623	6,139	1,881
Total exports .....	3,559,156	1,993,606	969,766	598,050
Total imports <u>a/</u> .....	44,593	<u>b/</u> 40,500	13,741	<u>b/</u> 8,634
Total reexports <u>a/</u> .....	4,747	---	771	---
Net exports .....	3,519,310	1,953,106	956,796	589,416
<b>LINTERS:</b>				
United Kingdom .....	18,348	23,150	5,189	6,329
Germany .....	17,796	26,631	7,018	7,416
France .....	5,750	10,435	3,172	1,997
Netherlands .....	4,379	10,263	1,545	4,414
Belgium .....	750	189	643	189
Other Europe .....	2,074	5,368	891	925
Total Europe .....	49,097	76,036	18,458	21,270
Japan .....	5,397	6,928	2,189	1,712
Canada .....	4,431	2,282	1,086	352
Other countries .....	1,992	1,105	772	414
Total exports .....	60,917	86,351	22,505	23,748

Foreign Agricultural Service Division. Compiled from official records of the  
Bureau of Foreign and Domestic Commerce.

a/ Bales of 478 lbs. b/ Imports for consumption.

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